

## Appointment Change Action After In-Training Appointment

PA40

### Change History

Update the following table as necessary when this document is changed:

Date	Name	Change Description
4/5/2005	Chylynn Hansel	Document Draft
4/7/2005	Teresa Dillon	SME Review
4/15/2005	Chylynn Hansel	Revision Draft
4/18/2005	Teresa Dillon	SME Review
4/29/2005	Chylynn Hansel	Edits
4/29/2005	Teresa Dillon	SME Review
6/28/2005		Agency Review
7/8/05	Peggy Graves	Internal Review
7/8/05	Chylynn Hansel	Edits
7/8/05	Peggy Graves	Internal Review
4/20/06	Chylynn Hansel	Edits/Change Name

### Purpose

Use this procedure to complete an **appointment change** after an In-training Probationary or In-training Trial Service Appointment has been successful.

### Trigger

Perform this procedure when an employee completes his or her In-training Appointment or completes a level in a multiple level In-training Appointment.

### Prerequisites

- Employee's In-Training Probationary Appointment has been successfully completed and the employee status has been updated to permanent. (See procedure **Update Employee Status to Permanent at Completion of an In-training Appointment.**)

### Menu Path










Human Resources → Personnel Management → Administration → HR Master Data  
→Personnel Actions

### Transaction Code

PA40

### Helpful Hints

The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
<b>Error</b> 	<b>Example:</b>  Make an entry in all required fields. <b>Action:</b> Fix the problem(s) and then click  (Enter) to proceed.
<b>Warning</b> 	<b>Example:</b>  Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. <b>Action:</b> If an action is required, perform the action. Otherwise, click  (Enter) to proceed.
<b>Confirmation</b>  or 	<b>Example:</b>  Save your entries. <b>Action:</b> Perform the required action to proceed.

### Related Procedure:

[Change of Status at Completion of In-training Appointment](#)

## Procedure

1. Start the transaction using the above menu path or transaction code **PA40**.


## Personnel Actions

Personnel no. 20000381  
Name Test, Tammy  
PersArea 1050 Office of Financial Mgmt EEGroup 8 Permanent  
PSubarea 0001 Non Represented EESubgroup 03 Scheduled Hourly Status Active  
From 2/1/2005

Action Type	Personn...	EE group	EE subg...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Paid Leave of Absence			
Unpaid Leave of Absence			
Return from Leave of Absence			
Group 2 to 1 New Hire/Tmnsfr			
Group 1 to 2 Sep/Tmnsfr			
Conversion Correction			
Military Dept - FedEENew Hire			

2. Complete the following fields:

Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number. <b>Example:</b> 20000381
From	R	The start date of a record. <b>Example:</b> 2/1/2005

3. Select the gray box to the left of **Appointment Change** to select.
4. Click  (Execute) to execute a process or action.

**Title: Appointment Change Action After In-Training Appointment**

**Processes :**

**Sub-Processes :**

HRMS Training Documents

5. Perform one of the following:

If	Perform
Role is <b>Personnel Administration Processor</b>	Steps 6 – 29
Role is <b>Payroll Processor</b>	Steps 30 -37

### Copy Actions (0000)

The screenshot shows the SAP 'Copy Actions (0000)' transaction. The top bar includes the SAP logo and standard menu options. Below the title bar, there are buttons for 'Execute info group' and 'Change info group'. The main data area contains the following fields:

- Pers.No.:** 20000381
- Name:** Test, Tammy
- PersArea:** 1050 Office of Financial Mgmt
- EEGroup:** 0 Permanent
- PSubarea:** 0001 Non Represented
- EESubgroup:** 03 Scheduled Hourly
- Status:** Active
- Start:** 02/01/2005 to 12/31/9999

Below this, there are sections for 'Personnel action', 'Status', and 'Organizational assignment'.

**Personnel action:**

- Action Type:** Appointment Change
- Reason for Action:** (with a matchcode icon)

**Status:**

- Employment:** Active

**Organizational assignment:**

- Position:** 70000251 Test Position 1
- Personnel area:** 1050 Office of Financial Mgmt
- Employee group:** 0 Permanent
- Employee subgroup:** 03 Scheduled Hourly

**Additional actions:**

Start Date	Act.	Action type	ActR	Reason for acti
02/01/2005	UJ	Change of Status	04	Non-Perm to Permanent

The bottom status bar shows 'RD0 (1) (201)' and 'sswwbhranlb2 INS'.

6. Complete the following field:

Field Name	R/O/C	Description
Reason for Action	R	The reason that an action has been performed. <b>Example:</b> Complete In-Training Series

7. In the reason for action field, click  (Matchcode) to open the selection list.

State of Washington HRMS

**File name:** APPT\_CHANGE\_ACTION\_AFTER\_INTRAINING.DOC  
**Version:** SME Approved Script  
**Last Modified:** 12/19/2008 11:32:00 AM  
**Reference Number:**

SAP Parent  
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## Reason for Action (2) 46 Entries Found

The screenshot shows a window titled 'Reason for Action (1) 46 Entries Found'. It has a 'Restrictions' tab and a toolbar with icons for save, print, and other functions. Below the toolbar, it says 'Action Type: U3' and 'Name of action type: Appointment Change'. A list of reasons for action is displayed, with entry 12, 'Complete In-Training Series', highlighted in yellow.

Ac...	Name of reason for action
01	Prom/Trial Service Apptmt
02	Temporary Appointment
03	In-Training Appointment
04	WMS Acting Appointment
05	WMS Apptmt With Review
07	WMS Apptmt Without Review
08	Adjustment of Hours Worked
09	Apptmt Full-Time Year Rnd Pos
10	Classified to Exempt
11	Complete In-Training Level
12	Complete In-Training Series
13	Demotion - Disciplinary
14	Demotion - In Lieu of RIF
15	Demotion - Voluntary
16	Dual Assign to Lower Class
17	Dual Assign to Higher Class
18	Elevation
19	Emergency Appointment
24	Exempt Appointment
25	Extend Probationary Period
26	Extend Trial Service Period
27	Extension of Temp Apptmt
28	On-Call Appointment
29	Pay Adjust-Align, Dev & Train
31	Realloc/Reclass Appointment

46 Entries Found

### 8. Perform one of the following:

If	Then
In-Training Appointment is Complete	Click 11- Complete In-Training Level

**Title:** Appointment Change Action After In-Training Appointment

**Processes :**

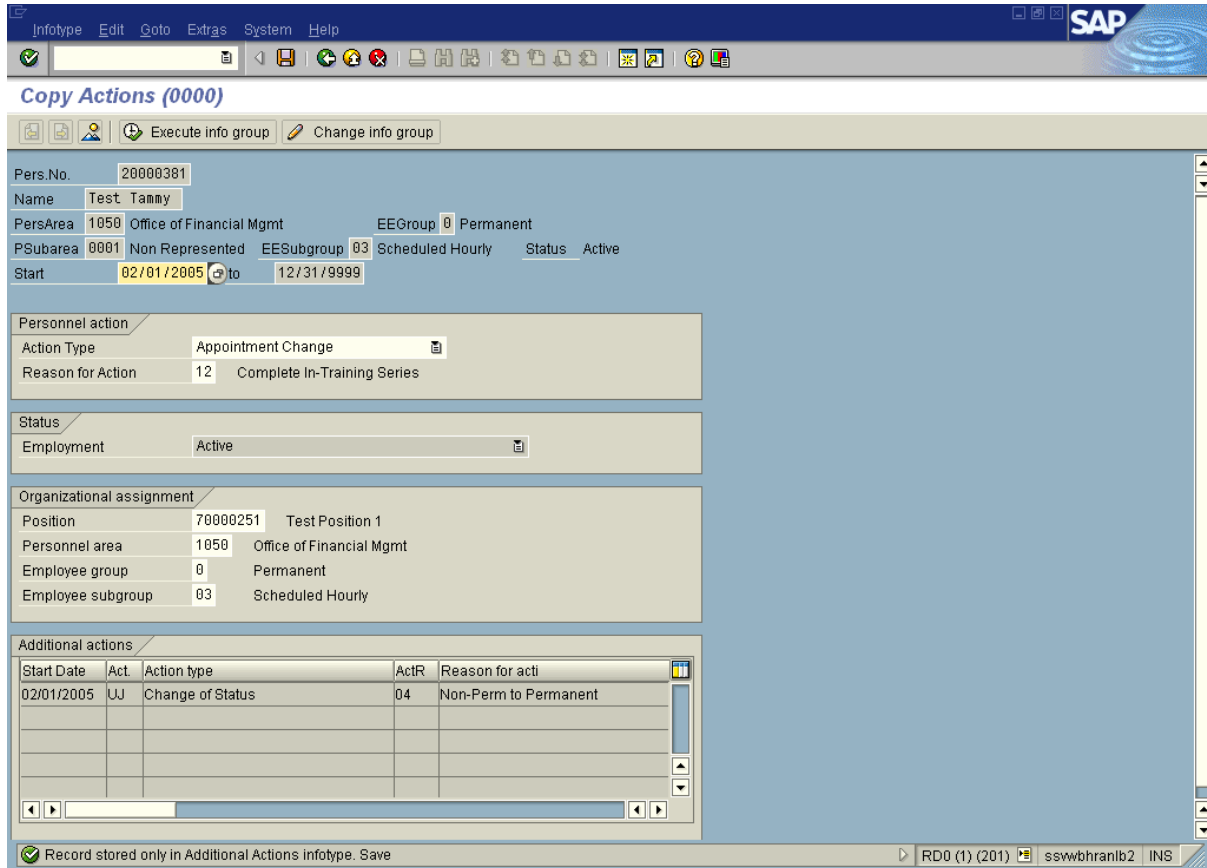
**Sub-Processes :**

HRMS Training Documents

If	Then
In-Training Appointment has multiple levels	Click <b>12 - Complete In-Training Level</b>

9. Click  (Continue) to accept.

## Copy Actions (0000)



The screenshot shows the SAP 'Copy Actions (0000)' screen. The top bar includes the SAP logo and menu options like Infotype, Edit, Goto, Extras, System, and Help. Below the title bar, there are buttons for 'Execute info group' and 'Change info group'. The main form area contains several sections:

- Pers.No.:** 20000381
- Name:** Test Tammy
- PersArea:** 1050 Office of Financial Mgmt
- EEGroup:** 0 Permanent
- PSubarea:** 0001 Non Represented
- EESubgroup:** 03 Scheduled Hourly
- Status:** Active
- Start:** 02/01/2005 to 12/31/9999


Below these fields are three main sections:

- Personnel action:**
  - Action Type: Appointment Change
  - Reason for Action: 12 Complete In-Training Series
- Status:**
  - Employment: Active
- Organizational assignment:**
  - Position: 70000251 Test Position 1
  - Personnel area: 1050 Office of Financial Mgmt
  - Employee group: 0 Permanent
  - Employee subgroup: 03 Scheduled Hourly

At the bottom, there is an 'Additional actions' table:

Start Date	Act.	Action type	ActR	Reason for acti
02/01/2005	UJ	Change of Status	04	Non-Perm to Permanent

The bottom status bar shows 'Record stored only in Additional Actions infotype. Save' and 'RD0 (1) (201) sswbhranlb2 INS'.

10. Click  (Enter) to validate the information.

11. Click  (Save) to save.

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**File name:** APPT\_CHANGE\_ACTION\_AFTER\_INTRAINING.DOC  
**Version:** SME Approved Script  
**Last Modified:** 12/19/2008 11:32:00 AM  
**Reference Number:**

SAP Parent  
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## Copy Organizational Assignment (0001)

**Copy Organizational Assignment (0001)**

Infotype Edit Goto Extras System Help

Org Structure

Personnel No. 20000381 Name Test Tammy

PersArea 1050 Office of Financial Mgmt EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 03 Scheduled Hourly Status Active

Start 02/01/2005 to 05/12/2005

**Enterprise structure**

CoCode WA01 STATE OF WASHINGTON

Pers.area 1050 Office of Financial Mgmt Subarea 0001 Non Represented

Cost Ctr Bus. Area 1050 Office of Financial Manag...

**Personnel structure**

EE group 0 Permanent Payr.area 11 Semi-monthly

EE subgroup 03 Scheduled Hourly Contract Trial Service

**Organizational plan**

Percentage 100.00 Assignment

Position 70000251 KW09

Job key 50000101 Test Position 1

Exempt N Test Job

Org. Unit 00000000

Org.key

**Administrator**

PersAdmin


Time


PayrAdmin

Record created RD0 (1) (201) sswbhranlb2 INS

12. Perform one of the following:

If	Then
The In-Training plan has multiple levels	In the <b>Contract</b> field, click <b>InTrng/Trl Srv</b> from the drop-down list.
The employee successfully completed the In-Training Appointment	In the <b>Contract</b> field, click <b>Trial Service</b> from the drop-down list

13. Click  (Enter) to validate the information.


14. Click  (Save) to save.

## Change Contract Elements (0016)

Personnel No. 20000381 Name Test Tammy  
PersArea 1050 Office of Financial Mgmt EEGroup 0 Permanent  
PSubarea 0001 Non Represented EESubgroup 03 Scheduled Hourly Status Active  
Start 2/1/2005 to 12/31/9999

Contractual regulations  
Contract type Permanent

Periods  
Probationary period 6 Months

15. Click  (Enter) to validate the information.



The **Probationary period** field is also used for the Trial Service period. Verify that the value matches the Trial Service period.

16. Click  (Save) to save.



## Create Planned Working Time (0007)

Personnel No. 20000381 Name Test, Tammy

PersArea 1050 Office of Financial Mgmt EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 03 Scheduled Hourly Status Active

Start 02/01/2005 To 12/31/9999

Work schedule rule

Work schedule rule R030

Time Mgmt status 1 - Time evaluation of actual times

Working week Working week Monday


☐ Part-time employee

Working time

Employment percent	100.00	<input type="checkbox"/> Dyn. daily work schedule
Daily working hours	24.00	Min. Max.
Weekly working hours	168.00	Min. Max.
Monthly working hrs	174.00	Min. Max.
Annual working hours	2080.00	Min. Max.
Weekly workdays	7.00	

Attention: Please check Basic Pay infotype (0008)

RD0 (1) (201) ssvaphrdedci INS

17. Click  (Enter) to validate the information.

18. Click  (Save) to save.

## Copy Date Specifications (0041)

Personnel No. 20000381 Name Test, Tammy

PersArea 1050 Office of Financial Mgmt EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 03 Scheduled Hourly Status Active

Start 02/01/2005 to 12/31/9999


Date type	Date	Date type	Date
01 Anniversary Date	01/01/2005	02 Appointment Date	02/01/2005
03 Original Hire Date	01/01/2005	05 Seniority Date	01/01/2005
07 Unbroken Srv. Date	01/01/2005	18 Prsnl HolidayElgblty	01/01/2005

Record valid from 01/01/2005 to 12/31/9999 delimited at end

RD0 (1) (201) ssvaphrdec INS

19. Complete the following fields:

Field Name	R/O/C	Description
02 Appointment Date	R	The Appointment Date for the employee. <b>Example:</b> 02/01/2005

20. Click  (Enter) to validate the information.

21. Click  (Save) to save.

**Title:** Appointment Change Action After In-Training Appointment

**Processes :**

**Sub-Processes :**

HRMS Training Documents

## Create Basic Pay (0008)

**22.** Complete the following field:

Field Name	R/O/C	Description
Reason	R	The reason for the appointment. <b>Example:</b> 20 Appointment Change

**23.** In the **Reason** field, click  (Matchcode) to open the selection list.

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SAP Parent  
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## Reason for Changing Master Data (2) 22 Entries Found

Reason for Changing Master Data (1) 22 Entries Found

Restrictions

Infotype: 0008

Re	Reason text
00	No Reason
01	Periodic Increment
02	Rng Inc Due to Board Action
03	Rdctn in slry w/in rng Discipl
04	Return from Red in Salary
05	Salary Adjmnt by Leg Action
06	W Rate (WMS Only)
07	Y Rate (Non WMS Only)
08	WMS Raise - Int Slry Rel Prob
09	WMS Raise - Grwth & Developmen
10	WMS Raise - Rec&Retention Prob
11	Employee Put on Disability Pay
12	Employee Taken off Dis Pay
13	Employee Put on Special Pay
14	Employee Taken Off Special Pay
15	Range Adjust-Multiple Level
16	Salary Adjust-Higher Education
17	Salary Adjust-Inversion/Comp
18	Sal. Adjust-Recruit/Retention
19	Initial Appointment
20	Appointment Change
21	Salary adjustmnt by Pers Area

22 Entries Found


24. Click **Appointment Change** (Reason text).

25. Click  (Continue) to accept.

## Create Basic Pay (0008)

26. Complete the following field:

Field Name	R/O/C	Description
Next increase	R	The date of the next pay increase. <b>Example:</b> 8/1/2005
PS group	R	The salary range of the employee. <b>Example:</b> 40
Level	R	The step within a salary range for compensation. <b>Example:</b> A

27. Click  (Continue) to validate the information.

## Create Basic Pay (0008)

Personnel No. 20000381 Name Test Tassay

PersArea 1050 Office of Financial Mgmt EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 03 Scheduled Hourly Status Active

Start 02/01/2005 to 12/31/9999


Subtype 0 Basic contract

Pay scale

Reason	20	Appointment Change	Capacity util. level	100.00
PS type	01	Classified Gov	Work hours/period	87.00
PS area	01	Standard Progression	Next increase	00/01/2005
PS group	40	Level A	Annual salary	28,961.00 USD

Wa...	Wage Type Long Text	O. Amount	Curr...	L.	A.	Number	Unit	Unit
1001	Base Rate / Hourly Wage	13.87	USD	I	✓			
			USD					
			USD					
			USD					
			USD					
			USD					

1Y 02/01/2005 - 12/31/9999 13.87 USD

28. Click  (Enter) to validate the information.

29. Click  (Save) to save.



The **Personnel Administration Processor** notify the **Organizational Management Processor** to update the job key to the appropriate job class. This will mark the end of

Completing Appointment Change after In-Training Appointment. After saving, click  (Exit) to exit the action and inform the **Payroll Processor** who will complete the action.

## Copy Actions

Infotype Edit Goto Extras System Help

**Copy Actions (0000)**

Execute info group Change info group

Pers. No. 20000381  
Name Test, Tassy  
PersArea 1050 Office of Financial Mgmt EEGroup 0 Permanent  
PSubarea 0001 Non Represented EESubgroup 03 Scheduled Hourly Status Active  
Start 02/01/2005 to 12/31/9999

Personnel action  
Action Type Appointment Change  
Reason for Action

Status  
Employment Active

Organizational assignment  
Position 70000251 Test Position 1  
Personnel area 1050 Office of Financial Mgmt  
Employee group 0 Permanent  
Employee subgroup 03 Scheduled Hourly

Additional actions

Start Date	Act	Action type	ActR	Reason for act
02/01/2005	UJ	Change of Status	04	Non-Perm to Permanent

30. Click Execute info group.
31. An information pop up box will appear informing you that "This entry will delete a record." Click (Enter) to continue.
32. An Execute info group pop up box will appear informing you that "Warning: Personnel action infotype not saved with 'execute info group' function!" Click Continue.
- The **Personnel Processor** has already saved this infotype so it is ok to continue.
33. Click (Next Record) until you reach *Copy Add.Withh.Info.US (0234)*.

**Title:** Appointment Change Action After In-Training Appointment

**Processes :**

**Sub-Processes :**

HRMS Training Documents

**Copy Add. Withh. Info. US (0234)**

Infotype Edit Goto Extras System Help

**Copy Add. Withh. Info. US (0234)**

Personnel No. 20000381 Name Test Tammy

PersArea 1050 Office of Financial Mgmt EEGroup 0 Permanent

PSubarea 0001 Non Represented EESubgroup 03 Scheduled Hourly Status Active

Start 02/01/2005 to 12/31/9999

**Overrides**

Tax authority FED Federal Tax level A Federal

Supplemental method Aggregation with Pay Periods Method

Override amount

Override percentage ☐ No Tax


Empl.override group 0031 1050-4902 Admin & clerical

**Common Paymaster**

☐ Common Paymaster



Update infotype if necessary.

34. Click  (Enter) to validate the information.

35. Click  (Save) to save.



**Title:** Appointment Change Action After In-Training Appointment

**Processes :**

**Sub-Processes :**

HRMS Training Documents

## Create General Benefits Information (0171)

**Personnel No.** 20000381 **Name** Test Tammy


**PersArea** 1050 **Office of Financial Mgmt** **EEGroup** 0 **Permanent**

**PSubarea** 0001 **Non Represented** **EESubgroup** 03 **Scheduled Hourly** **Status** Active

**Start** 02/01/2005 **to** 12/31/9999

General Benefits Information	
<b>Benefit area</b>	US USA
<b>1st Program Grouping</b>	EL16 Eligible for Rtrmnt
<b>2nd Program Grouping</b>	01 State Employees

Save your entries RD0 (1) (201) ssvaphrddcl INS

36. Click  (Cancel) to return to Personnel Actions **PA40**.

37. You have completed this transaction.

### Result

You have completed an appointment change after an In-Training Appointment.